Release Notes 3.20

General Improvements

12/16/2011

Discretionary Closeouts

With the addition of the Closeout module, GrantSolutions provides cradle to grave support for the full life cycle of grants from Program Announcements to Grant Closeout. With this latest release the Closeout functionality has been further enhanced to include the creation of Closeout Checklists; and additional Closeout search criteria within the new My Grants List consolidation screen. For a more detailed review and examination of this important new feature readers are directed to the detailed GrantSolutions Discretionary Closeout user manual guide on the GrantSolutions help site portal.

Entitlement Grants

The computation sheet will be attached to the NGA based on the configured funding categories.

Grant Notes Improvement

Based on feedback from end users; Grant Notes have been improved by utilizing a "SUBMIT" button displayed instead of the "ADD" button. After uploading a document to Grant Notes, the user must click on the SUBMIT button. A warning will be displayed should a user click the CANCEL button prior to saving.

Grant Notes – Old Screen   *Grant Notes – New Screen*

Simple Search Widget

A simple search widget has been added to grid search screens which include Grants List, Application Receipt Log, and Application Recommendation. This widget offers users a faster means of searching GrantSolutions resources.

Depending on which grid screen, users can perform a search using application number, grant number or organization name. At least 3 characters minimum is needed in the search field in order to run the search. The fields also accept partial search.

An example of the simple search widget is illustrated below for the Application Receipt Log.

Carry Over Enhancement

Grant personnel will have the ability to use a popup wizard to edit the financial info section (Line 24 of the NGA) to correctly capture the carryover of unobligated funds from one budget period to another without obligating new funds by accidentally changing the Fiscal Year of the re-obligation's Financial Account from the Fiscal Year of the de-obligation's Financial Account.

One should be able to view Financial Accounts previously used for this grant award within the past five (5) fiscal years; their associated budget period(s) and Obligation Document Number(s); and choose from which financial account the funds should be de-obligated. Using this in conjunction with the UOB Carryover amount from the Budget Worksheet, the financial info section should pre-populate as much for user as possible. This should be a simple, step-by-step process to complete a carryover action.

This action will be accomplished via a new link, Unobligated Action Assistance; and will be made visible or available above the Financial Information Table. This link, however, will only be made available for Unobligated Carryovers changes.

This feature is only available for ACF at this time.

New Unobligated Action Assistance (UAA) – NGA Edit Financial Section 24

The user is prompted to assign the proper Financial Account and Document information into the Financial Table fields.

Unobligated Action Assistance (UAA) – New Pop up Assistance Screen

User will be assisted in selecting the proper budget period to assign funds.

Unobligated Action Assistance (UAA) - Selection of Budget Period

The system will post the current financial info.

UAA correctly populates Section 24

Export Search Results

An export option has been added to the Application Receipt Log; and will be implemented on the new and soon to be released My Grant List and Application Screens.

Using the Advanced Search Function on these new screens, the Grant Staff can generate a listing table based on unique search criteria. Once search the search is completed, the user can select the export link at the bottom of the screen; and forward the search result fields to an Excel spreadsheet or comparable CSV format.

The example below shows a simple search based on submitted after and before dates only. Based on this date range the resulting table can be exported by selecting the export results link.

Application Receipt and Logging

The illustration below shows the automatic exported table results to an Excel spread sheet. Note that all table column data is copied to the spreadsheet.

Excel Export Results – (Before Editing)

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Submissic	Applicatic	Applicatic	Announce	Grant Prog	Organizati	Budget Pe	Application Status						
2	########	NS120000:	New	2012 R Tes	Social and	R CCR ORC	N/A	Awarded						
3	########	(To be ass	New	2012 R Tes	Social and	Hill Health	N/A	Received						
4	########	NS120000:	New	2012 R Tes	Social and	Test CCR	N/A	Review in Progress						
5	########	(To be ass	New	TEST 508/.	Healthy M	National [	N/A	Received						
6	########	NI120001C	Competin	R Test for	Native An	Micronesi	N/A	Review in Progress						
7	########	NR120000	Non-Com	N/A		Environm	Yukon Riv	########	Awarded					
8	########	NS120000:	New	2012 R Tes	Social and	Wise Won	N/A	Review in Progress						
9	########	NI120001C	Non-Com	N/A		Native An	Pima Prev	########	Awarded					
10	########	NA120004	Non-Com	N/A		Social Anc	The Lakot	########	Review in Progress					
11														
12														
13					Example - Export of Application Receipt Log									
14														
15														

CCR Improvements

For a new Award, the system will take the DUNS from the Organization record. If it is a Post Award Amendment, the system will take the DUNS from the Organization record if it is **validated**. Otherwise the system will take it from the previous NGA.

Partner Specific Enhancements

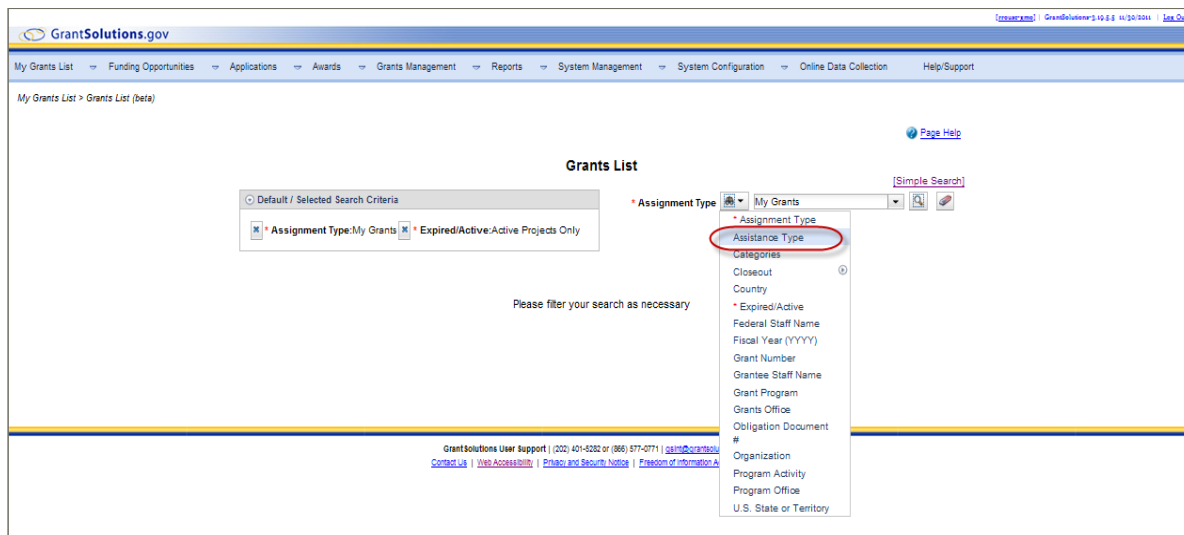## Denali Null Accounting Improvement

For amendments, added validation on Save/Verify that prevents user from selecting the same Financial Account and Administrative Code that has been previously used. Amounts will be consolidated for each Administrative Code. The Administrative Code is locked for amendments.

Tracking Grants – Additional Search Features

Added to the new Grants List search, an option for "Assistance Type" has been added. Users may now search the following subcategories from the Assistance Type Filters. These search criteria will be available on the new My Grants Consolidation Screen.

- Block Grant
- Formula Grant
- Project Grant
- Cooperative Agreement
- Direct Payment
- Direct Loan Guaranteed/Insured Loan
- Insurance
- Direct Payment
- Other
- Partner Assistance Types (Customized) will be displayed if configured.

Assistance Type – New My Grants List Consolidation Screen

Assistance Type – Sub Menus

Admin Module

The CFDA codes can be used across multiple programs and across multiple partners.

The authorization field will be confined to mandatory grant programs.